## **Adoption Reporting**

This guide showcases how to run adoption reports for your portfolio or individual LLC

## **Transactions and Your Adoption Rate**

## To see the number and types of payments for a given period

 Log in as an admin to your ClickPay Portal and from the Financial Reports tab, select Transaction Summary. For a specific LLC, under LLC/Association, select the property you'd like to analyze. For a portfolio-wide analysis, leave the report as it is.

FINANCIAL REPORTS		Enter any or all of the se All transactions are liste	earch criteria below to search for transactions. ed in EST time
	-	Management:	NorthPeak Property Management 💿 🗸
Bank Deposit Reports		LLC/Association:	Select LLC/Association 💿 🗸
		Site Location:	Select Site 💿 🗸
Payment History		Merchant:	Select Merchant 💿 🗸
	D	Payment Type:	One Time Payment;Reci V Payment Processor: All OV
Detailed Transactions Report	N	Status:	Authorized;Deferred V Deposited:
	1*	Payment Method:	×
Returned Transaction Report		Charge/Credit:	Charge 🕲 🗸
<ul> <li>NOOS</li> <li>NOOS and a second press of the seco</li></ul>		Merchant Sub ID:	
Transaction Summary			From: 05/16/2022 ×
		Transaction Date:	Custom dates  To: 06/15/2022  V
Declined Transactions		Settlement Date:	Custom dates - From: mm/dd/yyyy V To: mm/dd/yyyy V
		Uncheck column name t	
Lockbox History			VIACH VIONIINE Banking VILBX-ACH VILBX-CHK21 VICash VIEFT
		Ciedit Cards	

2. You can look at payment adoption over any period of time. To see payments in a single billing cycle, you can either look at the calendar month or look at the days leading up to and after the 1st of that month.

For example: To search for one billing cycle of payments, under Transaction Date, select the 16th of the previous month to the 15th of the month you are analyzing. i.e.: For the June 2022 billing cycle, search the date range 5/16/22 - 6/15/22.

- 3. Select ACH, Credit Cards, Online Banking, LBX, and Cash. For Charge/Credit, select charge.
- 4. Click search and you will be provided with a report detailing the total number of payments broken down by each payment type. To download the portfoliowide summary, under Search Results, select your format type (XLS, CSV) and click export. To download the report with transactions broken down by property, select a format underneath the management name and click export.



5. To get your **Adoption Rate**, divide the total electronic payments (Credit Cards, ACH, Online Banking, Cash, EFT) by your total payment count.

For example: 400 payments divided by 800 total payments = 50% electronic adoption rate

6. If you do not utilize ClickPay's lockbox product, simply divide the total number of electronic payments by your active unit count.

For example: 300 payments divided by 500 active units = 60% electronic adoption rate